

Powering Superior Customer Experience with Salesforce-Driven KYC and Case Automation

Overview:

A prominent financial institution aimed to improve **customer satisfaction** by automating its **KYC process**, optimizing **case management**, and providing a **360° view of customer profiles**. By reducing manual efforts and improving feedback management, the company sought to enhance **customer retention** and offer **its clients faster, more effective service**.

Pain points:



Manual KYC collection by field service agents, slowing down customer onboarding



Slow ticket resolution times lead to poor customer satisfaction and increased **attrition**.



Fragmented customer information, resulting in service agents lacking a comprehensive view of each customer



Lack of a structured feedback process, limiting insights into customer sentiment post-resolution

Solutions:

Feedback Management:

Implemented a feedback system within Salesforce, automatically sending post-resolution surveys to customers and capturing their responses to improve service quality.

KYC Automation:

Integrated Salesforce with the mFino app, automating the document collection process and assigning KYC inquiries to the appropriate team members for a quick resolution.

Case Management System:

Enabled Email-to-Case functionality in Salesforce, creating cases from customer issues and efficiently routing them to the appropriate teams for faster resolution.

Benefits:



30% ↑ in response rates for customer issues and tickets



Enhanced customer experience through a **360° view** of customer information



50% ↓ in manual **KYC efforts**, speeding up customer onboarding



↑ customer attrition by implementing a robust feedback management process, ensuring customer concerns were addressed effectively